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# ROI or evidence-based PR: The language of public relations evaluation

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*As evaluation of public relations programmes moves from output to outcome measurement with greater emphasis on integrated planning, research, and evaluation, the term Return on Investment (ROI) has been increasingly used by practitioners to express campaign results to decision-makers from managerial and financial backgrounds. Yet the United Kingdom's Institute of Public Relations rejects ROI as "not only confusing" but misleading. This article reviews the language of public relations evaluation from theoretical and best practice viewpoints in order to propose a platform of common terminology that can be implemented in theory and practice.*

## Introduction

This article considers whether a common terminology for evaluation of public relations activity can be developed. The context is the current debate, mainly in the United Kingdom, over whether the term Return On Investment (or ROI) is correct and appropriate for reporting on public relations campaigns and programmes.

Two analyses are undertaken. The first considers the debate over ROI and the second investigates the terminology of public relations evaluation as expressed in the titles of publications contained in two major bibliographies on this topic. This is triangulated with reviews of terminology in a major dictionary of public relations measurement and evaluation and in five models of public relations evaluation processes. The article concludes with initial proposals for a common terminology.

Over more than two decades, the terminology of public relations evaluation has been under discussion across the world. Watson (1997) commented that "there is considerable

confusion as to what the term 'evaluation' means. For budget-holders, whether employers or clients, the judgements have a 'bottom line' profit-related significance" (p.284). Grunig and Hunt (1984) wrote of a practitioner who justified the budgetary expenditure on public relations by the generation of a large volume of press coverage. He was flummoxed by a senior executive's question of "What's all this worth to us?" (p.129). White (1991) suggested that company managers have a special interest in the evaluation of public relations: "Evaluation helps to answer the questions about the time, effort and resources to be invested in public relations activities: can the investment, and the costs involved, be justified?" (p.141). Lindenmann, in Hon and Grunig (1999), identifies 'value' as a key concept when he poses the question, "How can PR practitioners begin to pinpoint and document for senior management, the overall *value* of public relations to the organization as a whole?" (p.2, emphasis added).

It would appear that the concept of demonstrating or proving 'value' or organisational benefit is embedded in the language of public relations practice. It is a short step to the widespread use of business language in public relations. This has been called for by the leading evaluation commentator Macnamara (1999). Watson and Simmons (2004) noted that Macnamara had identified two failings that helped explain why public relations lacks credibility in the eyes of management. The first was the failure of practitioners to undertake evaluation and the second, and relevant to this article, was failure to use the language of accountability preferred by management, such as MBO (management by objectives), TQM (total quality management), QA (quality assurance), benchmarking, etc. ROI

could be, and often is, part of that language set, too.

In this article, three research questions are posited:

**RQ1:** What is the role of ROI in current public relations terminology?

**RQ2:** What competing or analogous practices are influencing the use of business language in evaluation terminology?

**RQ3:** Which terminology is most widely used in measurement and evaluation and what is the frequency of ROI and similar terms?

### **ROI in public relations terminology**

The use of ROI terminology is not restricted to the United Kingdom or United States of America. Watson and Noble (2005, p.181) note an example from Professional Public Relations' Auckland office which is able to "measure the distribution and acceptance of messages and demonstrate a return on investment (ROI) to clients".

Watson (2001) commented that many definitions of evaluation emphasise effectiveness. Indeed Cutlip, Center, and Broom (1994) present evaluation as involving "systematic measures of program effectiveness" (p.406). Pavlik (1987) states that "evaluation research is used to determine effectiveness" (p.23), while Blissland (1990) describes it as "the systematic assessment of a program and its results" (p.25). Lindenmann (1993) says its role is to "measure public relations effectiveness" (p.7).

Another influence on terminology has been the emergence of payment-by-results (PBR) and performance-based fees (PBF) for public relations consultancy services since the mid-1990s. This has been driven by the introduction of procurement professionals into negotiations for the supply of professional services to major organisations, both governmental and commercial. These, as will be demonstrated later, focus on achievement of Key Performance Indicators, seek 'value for money' and do not necessarily seek long-term relationships with

professional advisers. The outcomes that procurement operatives seek are subject to strict contractual terms and are determined by financial or sales figures or media output indicators. As a balance to this emphasis on business language, it can be argued that this excludes the very important non-profit sector whose communication objective may be entirely non-financial or non-sales in content.

The recent debate over ROI has been strongest in the United Kingdom, with the focus on two reports from the Institute of Public Relations (IPR)<sup>i</sup> which have had conflicting outcomes. The first, in 2003, was a joint report by IPR and the national Department of Trade & Industry, entitled *Unlocking the Potential of Public Relations*. Its steering group recommendations included use of ROI:

The Institute of Public Relations and industry bodies should collate and promote resources on the return on investment (ROI) in public relations and identify best practices for how boards and management teams request, receive, consider and utilise public relations advice and support to help their organisations better achieve their business objectives. (IPR & DTI, 2003, p.6)

In other recommendations, the steering group suggested extending work on the procurement and supply of public relations services; forming a best practice case-study bank; and developing best practice guidelines for non-financial reporting. It also called for public relations industry bodies to encourage use of other measures to establish the effectiveness of public relations activities and gauge impact on attitudinal and behavioural change, as alternatives to advertising value equivalent.

In 2004, an alternative view came forward in another IPR report, commissioned jointly by IPR and The Communication Directors' Forum (a trade conference for senior communications professionals). This report, entitled *Best Practice in the Measurement and Reporting of Public Relations and ROI*, was conducted by and included survey data and interpretation from

the media analysis company, Metrica Research. Metrica found that only 6% of respondents (following prompted questions) claimed to measure public relations' contribution in ROI-related terms (IPR & CDF, 2004), although some 34% said they considered public relations budgets in terms of ROI. Metrica found that more than 50% of respondents thought using ROI for evaluation might have a positive effect on the way public relations performance could be reported, leading to bigger budgets and greater opportunities for public relations development.

In discussing the survey data, the report's (unnamed) authors argued against broad use of ROI or PR ROI:

The actual definition of ROI is a ratio of how much profit or cost saving is realised from an activity against its actual cost, which is often expressed as a percentage. In reality few PR programmes can be measured in such a way because of the problems involved in putting a realistic and credible financial value to the results achieved. As a result the term PR ROI is often used very loosely. This is not only confusing but also misleading and helps explain why the PR industry has traditionally found it difficult to demonstrate meaningful success that links PR cause to PR effect. (IPR & CDF, 2004, p.15)

The alternative proposed is "evidence-based PR", which is defined as "the difference made as a result of PR activity" (p.15). It is argued that this broader definition would encompass the efforts of the public relations industry to measure and report public relations activities using sophisticated techniques

Having considered both cases, the report found against PR ROI and in favour of "evidence-based PR", with the caveat that, "the term 'PR ROI' should only be used when a ratio of how much profit or cost saving can be directly attributed to specific PR activities" (p.15).

Other commentators to reject ROI include Lugbauer (2003) who argues, "ROI is a very

specific measure of the net income a firm earns with its total assets, one easier to apply to an enterprise than to a department" (§. 9).

While one can see rejection of ROI in the public relations context as a strictly inaccurate use of the term, the use of 'evidence-based PR' is not its direct replacement. Indeed it is comparing apples and oranges. ROI attempts to offer a business language term for outcomes, whereas 'evidence-based PR' is a descriptor for a range of methods to determine or describe outcomes. It does not assist practitioners who seek to explain the 'value' or 'outcomes' to those to whom they report. On the other hand ROI may not be accurate shorthand for outcomes, either. As will be shown later, it has a negligible role in the language of evaluation, too.

Earlier, the role of procurement professionals in shaping the pricing, performance characteristics, and reporting of public relations campaigns was described. The United Kingdom's Public Relations Consultants' Association recently published 'Procurement Public Relations; A Guide to Public Relations Consultancy for Procurement Professionals' (PRCA, 2004). As shown in the two points extracted below from a page headed 'Negotiating with Public Relations People', the guide avoids the term ROI and focuses on Key Performance Indicators (KPIs) in order to encourage purchasers of public relations services to focus on a range of objectives and outcomes, rather than a single ROI-type quotient on which performance is rewarded or penalised:

4 – What Key Performance Indicators and what core deliverables do the consultancies envisage as being crucial to the success of the programme? ....

7 – Which methods of measurement and evaluation do the consultancies believe are most suitable to the assignment? Have you set aside a separate budget for this function? (PRCA, 2004, p.11)

Another contrary view on ROI has been proposed by Murray and White (2004) who undertook a qualitative study on United

Kingdom CEOs' views about reputation management. The main findings included that CEOs did not consider public relations effectiveness amenable to precise measurement, being long-term and iterative in effect, or being an aid to avoiding surprises and mistakes. They also did not feel a great need to demonstrate a return on their investment in public relations.

Specifically, John Hancock, CEO of MFI Furniture Group (the UK's largest furniture retailer), rejected ROI:

I don't believe there is a return on investment for public relations – it is a necessary cost. I can gauge how much I need to spend by comparing the cost of my PR resource with other costs and get a sense of what is appropriate. (cited in Murray & White, 2004, p.6).

Other research on business attitudes towards performance assessment of public relations also indicates that ROI is either inappropriate or rejected. Mew's (2004) preliminary report on his research, titled "The business case for spin", looked at the attitudes of procurement professionals, in-house and consultancy practitioners on a range of performance and assessment issues and found an emphasis on KPIs. The KPIs named as "most important by all" groups are:

- Number of Articles Appeared
- Assessed Promotion of Messages
- Quality of Strategic Advice

Specifically, procurement executives who have an increasing influence on the purchase of public relations service nominated Increased Sales as "most important". Also ranked as Favoured (i.e. less important than "Most Important") was assessment "on a balanced score card consisting of many KPIs". As for ROI, Mew found the proposition that "ROI-based measurement that tracks performance against KPIs is the only really affordable and practical metric" (p.15) scored 3.5 on a six-point scale.

From Murray and White's qualitative research and Mew's online survey data, it can be contended that the demand from business for evaluation language in its own terms may be over-stated, thus challenging industry proponents (such as the IPR & DTI 2003 report) of this terminology.

## Discussion

The exploration above of RQ1 and RQ2 (regarding the current roles of ROI and competing terminology) suggests that, although some in public relations practice use ROI, the term is not widely recognised as valid by customers and employers. It is increasingly being rejected by peak professional bodies as inaccurate and misleading. The debate over ROI also shows a very narrow view of public relations, essentially as a one-way marketing communication process. It ignores the broader discussion of two-way asymmetrical and symmetrical models and the capacity for public relations to create interactions and manage relationships. However, recent trade press articles show that ROI is current terminology. An example comes from *PR Week*, United States edition, which recently reviewed evaluation practice with the headline, "The quest for ROI". The first sentence of the 1650 word article read, "Determining a return on investment for PR has never been easy" (Iacono, 2005, p.15). The terms "ROI" or "return" were used 20 times.

## Analysis of terminology

In order to determine the terminology of evaluation, including the role of ROI as a primary term, and to identify alternatives, words in the titles of publications in two major bibliographies of public relations evaluation were analysed. These were the *Bibliography of Public Relations Measurement* (Carroll & Stacks, 2004) and *A Bibliographical Resource of Works About Public Relations Media Measurement Research and Evaluation* (Phillips, 2004).

## Methodology

These documents share some titles and any duplication was eliminated in the analysis. All titles in the bibliographies were coded for their relevance to public relations (with public relations, PR, or public affairs in the article or book title or the title of publication in which they were carried). Then words were chosen in noun, verb, and adjectival form. Single or multiple words were chosen with, for example, “measurement and evaluation” appearing together in numerous titles. No attempt was made to identify a primary word; all relevant words were chosen. This methodology’s limitations lie with the sources of terminology

which have been mediated by others in their selection for bibliographies, and may not offer a complete picture of all practitioner and academic discussion, however they do give an indicative picture of trends.

## Results

In all, 244 relevant words were identified in these two extensive bibliographies. No articles or book titles, however, used the specific terms Return on Investment or ROI in their titles. There were only two instance of ‘Return’.

**Table 1: Measurement and evaluation terminology, listed alphabetically**

Term	Freq
Analysis *	2
Accountability *	1
Appraise *	1
Assessing/assessment	5
Benchmark/benchmarking	3
Bottom Line *	4
Change *	1
Demonstrating /showing	3
Effective/effectiveness	19
Evaluation/evaluating	51
Excellence/excellent *	2
Impact	4
Measuring/measurement/measures	71
Monitoring *	1
Observation *	1
Outcomes *	2
Performance	3
Planning	5
Relationship(s)	4
Reporting *	1
Research	46
Results *	1
Return	2
Success	5
Turn around *	1
Value	5
	<b>244</b>

\* Terms that appeared in one bibliography only.



Measurement (and its variations) was the most frequently used term. It is broad in its meaning and usage indicating extent, comparison with like, and by time-on-time.<sup>ii</sup> It is not, however, tied to a programme result and can be considered, like ‘evaluation’ or

‘research’ to be a process descriptor. Less frequent terms such as ‘assessing/assessment’ and ‘planning’ are also process descriptors, although ‘effectiveness’ could possibly be considered terminology that indicates results or outcomes.

**Table 2: Measurement and evaluation terminology, ranked by frequency and percentage**

Frequency (N = 244 words)

<b>Terms</b>	<b>Freq</b>	<b>%</b>
1. Measuring/measurement/measures	71	29.10
2. Evaluation	51	20.90
3. Research	46	18.85
4. Effective/effectiveness	19	7.78
5. Assessing/assessment	5	2.05
6. Planning	5	2.05
7. Success	5	2.05
8. Value	5	2.05
9. Bottom Line	4	1.64
10. Impact	4	1.64
11. Relationship(s)	4	1.64
12. Benchmark/benchmarking	3	1.23
13. Demonstrating /showing	3	1.23
14. Performance	3	1.23
15. Analysis	2	0.82
16. Excellence/Excellent	2	0.82
17. Outcomes	2	0.82
18. Return	2	0.82
19. Accountable	1	0.41
20. Appraise	1	0.41
21. Change	1	0.41
22. Monitoring	1	0.41
23. Observation	1	0.41
24. Reporting	1	0.41
25. Results	1	0.41
26. Turn around	1	0.41
	<b>244</b>	<b>100</b>

The analyses also placed the business terminology into a highly doubtful position in terms of its validity as common usage in public relations activity. Terms (in descending importance) such as ‘success’, ‘value’, ‘bottom line’, ‘return’, ‘excellence/excellent’, ‘return’, ‘change’, ‘results’, and ‘turn-around’ totalled

only 21 mentions or 8.6%. ‘Bottom line’ which, along with ‘return’, is the closest to ROI in meaning, rated less than 2%. It is notable that business leaders and procurement executives (Murray & White, 2004; Mew, 2004) also reject this language, so solutions need to be found from other sources.

As a cross-reference, the *Dictionary of Public Relations Measurement and Research* (Stacks, 2002) was also viewed for instances of ROI or similar terms. There were none. The leading four terms from the survey of the bibliographies were defined as:

Measuring/measurement: the way of giving an activity a precise dimension, generally by comparison to some standard; usually done in a quantifiable or numerical manner. (Stacks, p.17)

Evaluation Research: a form of research that determines the relative effectiveness of public relations campaign or program by measuring program outcomes (changes in the levels of awareness, understanding, attitudes, opinions and/or behaviors of a targeted audience or public) against a predetermined set of objectives that initially established the level or degree of change desired. (Stacks, p.10)

Research: the systematic effort before (formative research) or during and/or after (summative or evaluative research) a communication activity aimed at discovering and collecting the facts or opinions pertaining to an identified issue, need, or question; may be formal or informal. (Stacks, p.26)

Effectiveness was not mentioned in the dictionary. ‘Relationship(s)’ were also not mentioned specifically, although appearing within ‘Causal Relationship’.

As a further triangulation, well-known models of evaluation such as Cutlip, Center and Broom’s “Preparation, Impact and Implementation” (2000, pp. 436-47), Macnamara’s “Macro model” (1992, p.19), Lindenmann’s “PR Effectiveness Yardstick” (1993, p.7), Watson’s “Short-term” and “Continuing” models (2001, pp. 267-68) and Noble’s “Unified” model (Watson & Noble, 2005, pp. 87-90) were also reviewed for their use of terminology.

The results or outcome stages from these models were:

<b>Cutlip et al:</b>	<b>Impact</b>
<b>Macnamara:</b>	<b>Results</b>
<b>Lindenmann:</b>	<b>Outcome</b>
<b>Watson (Short term):</b>	<b>Yes/No</b>
<b>Watson (Continuing):</b>	<b>Succeed/Stay Alive)</b>
<b>Noble:</b>	<b>Result</b>

Despite the range of terms, with only Macnamara and Noble having near-similarity in ‘results’ and ‘result’, none of the models used ROI or Return. All, however, have terminology indicating some form of outcome or effect, but no place for ROI.

### **Towards common terminology**

Drawing together the analysis of terminology from the three sources, a solution is proposed that comes from the existing language of public relations evaluation. As noted above, the most appropriate and valid terms are those that indicate outcome, results, or an effect. Rather than create new terms, the proposal is to support the promotion of one that is simple, well-recognised, and is well-rooted in contemporary public relations theory and discussion. In a wide range of literature on public relations evaluation and practice, Lindenmann’s three-step yardstick has been the standard structure for the terminology of public relations evaluation. The yardstick emphasised research and measurement in three ascending levels of sophistication. These stages can be summarised as:

**Output:** presentation of the campaign, typically through media relations and measured by media placements

**Out-growth:** measures reception of messages to deduce retention, comprehension and awareness using quantitative and qualitative methods (interviews, focus groups, polling)

**Outcome:** measures opinion, attitudes and behavioural changes, using pre- and post-campaign research including a wide

of social science, polling and commercial market research techniques. (Lindenmann, 1993, p.7)

Although ‘outcome’ scored weakly in one analysis (two mentions and 0.82%), the term encapsulates many of the elements that proponents and opponents of PR ROI identify as important. As defined by Lindenmann, it is measurement-based and can be applied to continuing campaigns (to answer the ‘where are we now?’ questions) and to completed programmes (to answer ‘what was achieved?’). It can be the response to KPIs (whether they have been achieved or not) and to ‘evidence-based PR’. Singh and Glenny (2004) also identify that outcome research “can be used in the input phase of the next planning cycle” (Singh & Glenny, cited in Johnston & Zawawi, p.145). Adding these attributes together gives the term ‘outcome’ a universality that eludes the term ROI with its commercial/financial business focus.

Outcomes (arguably identical to ‘outcome’) are defined by Stacks (2002) as:

- (1) quantifiable changes in awareness, knowledge, attitude, opinion, and behaviour levels that occur as a result of a public relations program or campaign;
- (2) an effect, consequence, or impact of a set or program of communication activities or products, and may be either short-term (immediate) or long term. (p.20).

Alternatives such as ‘impact’ and ‘results’—for example, Cutlip, Center, and Broom’s PII model (Cutlip et al., 1994 & 2000) and Macnamara’s macro or pyramidal model (Macnamara, 1992 & 1999)—have been used for many years and share some of the virtues of ‘outcome’ terminology, including measuring changes in opinion, behaviour, and knowledge of messages. However, these words encapsulate an end-game or the ultimate stage more than ‘outcome’, which as defined above includes continuing campaigns and programs. It is notable that neither ‘impact’ nor ‘results’ is included in Stacks’ (2002) dictionary.

Outcome, as a term, may be the answer to the eternal practitioner questions of ‘how do we measure the incorrect or damaging media report that did not appear and how do we evaluate issues monitoring?’ ‘Impact’ and ‘result’ only reflect the positive and not the neutral or negative.

Other terms to be considered in public relations research, measurement, and evaluation terminology include Key Performance Indicators (KPIs) and ‘evidence-based’ public relations. From Mew’s research and the focus of trade groups like the PRCA on educating procurement professionals, KPIs are being imposed through commercial contract arrangements. It may not be possible to amend the terminology because it is being promoted by service purchasers. However, it is important for consultancy and in-house practitioners to negotiate KPIs that are applicable to practice and not just financial/sales measures or media output expectations. The observation that United Kingdom CEOs did not consider public relations effectiveness amenable to precise measurement (Murray & White, 2004) is an antidote to narrow KPIs. Perhaps KPIs should be negotiated as ‘objectives’, which would encapsulate the long-term, iterative nature of public relations, including its environmental monitoring and intelligence-gathering functions.

‘Evidence-based’ public relations has the flavour of a campaign theme, reminiscent of the PROOF campaign by *PR Week* (United Kingdom edition). In the late 1990s and early part of 2000, PROOF called for a 10% budget allocation for programme evaluation. For ‘evidence’, it can be argued that ‘outcome’ or ‘outcomes’ would be equally appropriate. There is no doubt that evidence of performance and effective strategy and tactics in pursuit of soundly-based objectives is important, but it is not necessarily the best replacement for flawed terms such as ROI.

## Conclusion

This paper has reviewed the debate over ROI and concluded that there is little demand for this term or recognition of it by employers and customers. Indeed, business voices reject it



although some in the public relations sector continue to promote it. What appears to be a convenient ‘biz-speak’ term could be another indication of low confidence amongst public relations practitioners (Watson & Simmons, 2004) to explain and promote their strategies and methods of operation and a route of ingratiation with purchasers of their services. By using current business language, perhaps they hope to be seen on the same level as sellers of capital equipment and direct-response services. Public relations practitioners who promise an ROI create a dangerous precedent towards publicity-function marketing communications. Although the Institute of Public Relations and Communication Directors’ Forum (2004, p.15) has accepted use of a narrow definition of PR ROI, it would be advisable for clarity to move away from any use of the term.

In its place, ‘outcome’ is proposed as both more appropriate and linked more closely to measurement and evaluation. It encapsulates the totality of public relations practice rather than the narrowly defined ROI. It is of concern that another business term, KPI, is rampant in public relations practice, being driven by procurement professionals in contract negotiations. Although KPIs are not as threatening to the understanding of public relations as ROI, they need to be defined by strong objective-setting processes rather than financial/sales imperatives.

I hope that further discussion of the terminology and language of public relations will follow and that others will contribute to this emerging debate.

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<sup>i</sup> The Institute of Public Relations (IPR) became the Chartered Institute of Public Relations (CIPR) earlier this year (2005), however given these publications predate the change, they are referenced as IPR.

<sup>ii</sup> Explanatory note: 'Time-on-time' is the same as 'period-on-period' and indicates, for example, the outcome in 2005, compared with 2004, or the first quarter with the second quarter.